

Financial Services

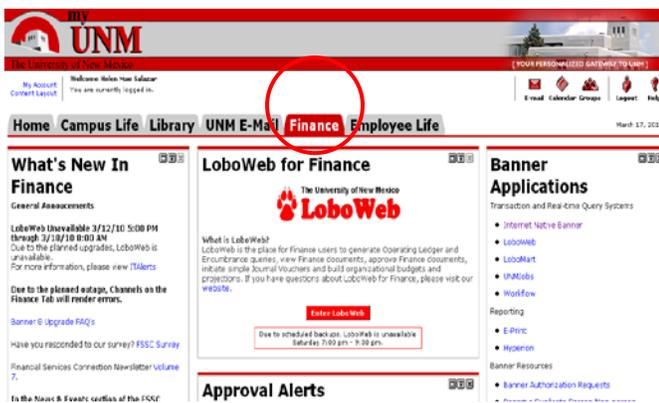
Date: 09/01/2011

My Worklist Channel FSJA-053

Users with any Finance Security will have the Finance Tab defaulted as a tab when they log into the MyUNM portal.

In order to have access to the My Worklist channel a user must have the security to approve workflow activities

1. On the Finance tab.



2. Go to the My Worklist channel.

- This displays Workflow activities that require action.
- Examples:
 - A. Banner Authorization Requests
 - B. 90 Day Memo
 - C. Labor Redistributions
 - D. Labor Distributions

3. Selecting the workflow, a hyperlink will start the workflow activity, requiring action.

- A. Click on item to approve OR
- B. Select 'Open Workflow'

4. Refresh

- A. Click to verify that the approval was accepted
- B. Click to check if any new workflow items need to be approved

5. Show Entire Worklist

- A. Cannot approve from this screen
- B. Will show items awaiting approval

6. The icons on the top right hand side of the channels provides the ability to set up the worklist page.

- A. Pencil Icon-Edit and set up worklist
- B. Page Icon-View the worklist full screen
- C. Arrow Icon-Minimize or maximize screen
- D. X Icon-Remove Channel

4	2U0224	594B	824,994	763,958	61,036	92.60	7.40
5	2U0224	480A	508,688	745,850	-237,162	146.62	-46.62

Organization	Workflow Name	Activity	Created	Details
UNM	Invoice 10018927	CorrectApproverInfo	20-Mar-2009 10:48:25 AM	
UNM	Banner Authorization Request (DEVL) for Valerie Martinez (VAL)	supervisorApproval	15-Jan-2009 01:48:40 PM	

Refresh
 Show Entire Worklist
 Open Workflow

For information on adding a channel see job aid [FSJA-014 Adding a Channel](#) on the FSR website (www.unm.edu/~fssc).

****End****